

Aging and Adult Administration Monthly Legal Service Report



Month: _____

Year: _____

Submitted by: _____ Region: _____

Date: _____

		Total Month (A)	Total YTD (B)
CLIENTS			
1	Number of New Clients Served (unduplicated)		
2	Number of Total Clients Served		
VOLUNTEERS			
3	Number of Hours Worked by Volunteers		
4	Number of Active Volunteers		
OUTREACH/EDUCATION			
5	Number of Community Outreach Presentations		
6	Number of Education Sessions		
7	Number of Attendees at Education Sessions		
TRAINING			
8	Training Attended Staff/Volunteers		
List Training(s)			
(1)_____ (2)_____ (3)_____			
(4)_____ (5)_____ (6)_____			
HOME VISITS			
9	Number of Home Visits		
ACTIVITIES, LESSONS LEARNED, SIGNIFICANT EVENTS/CASES			
10	Significant Issue(s): (Brief summary below or attach summary)		

Submitted by: _____

Print

Signature

Monthly Legal Service Report Instructions

Reporting Agency Information

- A. **Month:** Month of Service Provision.
- B. **Year** Federal Fiscal year in which the monthly data is being reported.
- C. **Region** Your Area Agency Regional Designation.
- D. **Date** Date report completed.

Clients

- 1a. **Number of Clients Served Unduplicated:** Total number of individual clients served in the reporting month.
- 1b. **Number of Total Clients served Unduplicated:** a cumulated total of individual clients served year to date.
- 2a. **Total Number of Clients Served:** Total number of clients contacts that receive service in the reporting month and in which services were billed to the Older Americans Act, Title III funds.

Home Visits (optional)

- 3a. **Number of Home Visits:** Provide total number of home visits made to homebound and or disabled clients in the reporting month.
- 3b. **Number of Home Visits:** Provide a Year to Date total number of home visits made to homebound and or disabled clients.

Volunteer Advocates

- 4a. **Number of Volunteers Hours by Legal Advocates:** Total volunteer service hours provided during reporting month to Area Agency Legal Service by lay legal advocates.
- 4b. **Number of Hours Worked by Volunteer Legal Advocates:** Total volunteer service hours provided Year to Date.
- 5a. **Number of Active Volunteers Advocates:** Total volunteers active in the reporting month.

Volunteer Attorneys

- 6a. **Number of Volunteer Attorneys Utilized this Month:** The total number of volunteer attorneys that either provided services or consultation to an OAA client.

- 7a. **Number of Volunteer Attorney Hours:** Total of hours of services/consultation provided to OAA clients by volunteer attorneys.
- 7b. **Number of Volunteer Attorney Hours YTD:** Year to Date total of volunteer hours reported by attorneys providing service/consultation to OAA clients.

Outreach/Education

- 8a. **Number of Community Outreaches** (promoting program). Provide the total number of community outreaches that are specific to promoting the legal services program as outlined under the Older American Act. Provide date and function detail on reverse side of monthly report.
- 8b. **Number of Community Outreaches** (promoting program). Provide the total year to date number of community outreaches that are specific to promoting the legal services program as outlined under the Older American Act.
- 9a. **Number of Education/Training Sessions:** Provide the total number education/training sessions conducted during the reporting month. Education/training is defined, as seminars conducted by the provider on topics concerning elder issues i.e. will, probate, consumer fraud, Medicare etc. List detail on reverse side on monthly report, (date, topic and group or location) i.e. senior center, Kiwanis club, NARFE etc.
- 9b. **Number of Education/Training Sessions:** Provide the total year to date number of education/training sessions conducted.
- 10a. **Number of Attendees at Education/Training Sessions:** Total number of individuals in attendance at educational/training sessions. If provider is not the primary sponsor of the session and sign-in sheet or true number is not available then provide an estimate number of attendees.
- 10b. **Number of Attendees at Education/Training Sessions:** Total year to date number of individuals in attendance at educational/training sessions.

Activities, Lessons Learned, Significant Events/Cases

- 11. This section should address the following topic areas: outreach (including activities targeted at underserved populations), any other outreach activities, best practices, information access and dissemination, training partnerships, networking, and technical assistance, or any significant events/cases of interest. This space may also be use to request for technical assistance or support from the state office. Briefly describe on the report or on a separate page.

Print and Sign the Monthly Report!

Monthly Report Due by the 20th of the following month immediately following reporting month. Unless the 20th is a weekend or holiday, then the report will be due on the first workday following the 20th day of the following month. Example August monthly report would be due September 20th.